# City Research Online

## City St George's, University of London

**Citation:** Reinmoeller, P. & Giudici, A. (2013). Sense Worldwide: Transforming the rules of innovation. UK: Cranfield School of Management.

This is the accepted version of the paper.

This version of the publication may differ from the final published version. To cite this item please consult the publisher's version.

**Permanent repository link:** https://openaccess.city.ac.uk/id/eprint/16523/

**Copyright and Reuse:** Copyright and Moral Rights remain with the author(s) and/or copyright holders. Copies of full items can be used for personal research or study, educational, or not-for-profit purposes without prior permission or charge, unless otherwise indicated, provided that the authors, title and full bibliographic details are credited, a hyperlink and/or URL is given for the original metadata page and the content is not changed in any way. For full details of reuse please refer to City Research Online policy.

City Research Online: http://openaccess.city.ac.uk/ publications@citystgeorges.ac.uk

# SENSE WORLDWIDE: TRANSFORMING THE RULES OF INNOVATION (PART A)

## Idea foundation

> *"You have to innovate with the customer, involve the customer early in the innovation process and keep them involved, co-creating and co-designing with you throughout".*
>
> *A.G. Lafley, former P&G CEO*[1]

"Have you ordered the fish and chips?" asked Jeremy Brown as he was climbing the 76 steps to the Sense Loft, a light and airy meeting space on the fourth floor of the building. Behind him, a colourful group of interdisciplinary employees of the UK agency Sense Worldwide was debating what some well-known bloggers had just posted online. It was late August 2011 in Soho, the centre of London's cluster of creative agencies, and the Sense Worldwide team enjoyed gathering in the loft with a huge number of post-its for one of their characteristic co-creation ('collaborative creation') workshops (see **Exhibit 1**).

Sense Worldwide had been developing its co-creation approach since the end of the '90s. "*Why don't we convene a bunch of creative thinkers and doers from around the world, get them to tell us what's going on out there and collaborate to develop new things?*" Brown often recalls when describing the founding idea. In 1998, Sense Worldwide started developing a community of independent creative people, willing to work on a per-project basis. Named The Sense Network, by 2011 it had grown steadily to include over 3,000 members across 55 Countries and 35 languages involved in a variety of activities such as new product development, grassroots competitor intelligence, micro-trends monitoring and expert interviews.

### Economic Landscape

The idea of Sense Worldwide developed in an environment that was being shaken by major transformations[2]. The UK economy was enjoying a decade of sustained growth (see

This case series was made possible through the generous cooperation of Sense Worldwide. The authors prepared this case as the basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation. Cases are not intended to serve as endorsements or sources of primary data.

Copyright © 2013 Alessandro Giudici and Patrick Reinmoeller

[1] Donlon, J.P. (2008). P&G's A.G. Lafley talks about making real innovation happen. www.chiefexecutive.net. See also: Lafley, A. G. and Charam, R (2008). The Game-Changer: How you can drive revenue and profit growth with innovation. New York: Crown Business.

**Exhibit 2**) and creative industries were becoming increasingly important[3] (see **Exhibit 3**). Marketing agencies were on the rise[4] with research and advertising agencies being the most popular type. Since 1994, for instance, the UK Market Research industry had grown by 67.0% and was worth £810m in 1998 while the total spending on advertising increased by 24.5% up to £14bn (see **Exhibit 4**). This trend was expected to continue steadily in the following years (see **Exhibit 5**). Many small size agencies (see **Exhibit 6**) were competing on the basis of a mix of creativity and value for money (see **Exhibit 7**). However, the industry was also undergoing a process of consolidation and increasing pressure from a number of global groups. In addition, the Internet was becoming pervasive as a way to reduce the costs of data gathering despite widespread concerns about the representativeness of online samples.

*Market Research Agencies*

Agencies focusing on market research tended to conduct two types of activities. Primary research included a variety of data collection methods such as interviews, questionnaires, direct observation and more ethnographic approaches aimed to investigate cultural phenomena. Secondary research involved the analysis of data from third-party sources such as literature reviews, archival and company material and public databases. Despite of the popularity of quantitative research, at the end of the '90s other more qualitative approaches were well established (see **Exhibit 8 and 9**). Client retention was increasingly supported by the format and design of the final deliverables, both elements often overlooked in favour of analytical robustness. Leading groups active in the UK were, among others, AC Nielsen, The Kantar Group, GFK and IPSOS.

*Advertising and Creative Agencies*

Advertising agencies were generally responsible for three types of activities: creating and placing new advertising campaigns and conducting other complementary marketing activities. A tendency in the '90s had been the rise of a population of small agencies focusing on a single activity. Creative agencies worked as independent creative boutiques and were not responsible for the production of finished artwork or commercials. Media and integrated marketing agencies were instead mainly small businesses operating at low margins and often independent subsidiaries of largest groups. It was not unusual for independent agencies to heavily invest on and pitch for specific projects *vis-a-vis* more established competitors to gain awards and popular recognition (see **Exhibit 10**).

---

[2] This section draws especially on Keynote, *Market Research Agencies: 1999 Market Report*, 2000 and Market Assessment International, *Advertising Agencies*, 2000.

[3] Florida, R. (2002), *The Rise of the Creative Class. And How It's Transforming Work, Leisure and Everyday Life*, Basic Books

[4] Burns, A. C. and R. F. Bush (2003). *Marketing Research: Online Research Applications*, 4th ed. Prentice Hall.

*The Full Service Groups*

In 1998, the top ten groups were offering a full range of activities and controlled 46% of the world's expenditure in creative services (see **Exhibit 11 and 12**).In this way they were targeting global clients while at the same time trying to maintain creative independence. However, given the amount of confidential information they had about their clients, it was unusual for any full service agency to work with more than one client in any market sector at the same time.

*Major Clients and Suppliers of Marketing Agencies*

In 1997-1998, companies in the consumer goods market were the key buyers of market research and the most important in terms of advertising expenditures (see **Exhibit 13**). Among the top ten advertising companies leading investors were also telecommunication companies and car manufacturers with an important role played by the public sector as well (see **Exhibit 14**).

UK advertising channels were highly concentrated with multi-national media groups owning the majority of newspapers and publishers. In television and radio communications, both terrestrial, satellite and cable, an important role was played by the BBC (British Broadcasting Corporation), the public service broadcaster. However, in terrestrial television the largest stations were owned by just three groups, i.e. the BBC, ITV and Channel 3, in cable television, by four players reduced to two by 1999, i.e. Telewest and NTL whilst in satellite broadcasting one single direct company, BSkyB, supplied half of the four million satellite service-using homes. Finally, the newspapers market presented a very similar level of concentration with groups such as News Corporation, United News, the Telegraph Trust and Independent News & Media (see **Exhibit 15**).

## Early History of Sense Worldwide

"People will always pay for ideas". It was this insight that grew in Jeremy Brown's mind at the beginning of the '90s into what then became Sense Worldwide. After an experience as organizational development consultant in British Telecom, in 1994 he moved to JWT, one of the biggest advertising agencies in the world (see **Exhibit 12**) where he realized that selling ideas was not as easy as expected. It was critical to make people understand how they were created.

In 1998, Brown started incubating Sense Worldwide for about two years in a small office above a London nightclub in Charing Cross. He partnered with two sociologists and an intellectual property lawyer and benefited from the external support of Raj Panjwani who later became Sense Worldwide's Communication and Design Director. Together, they targeted clients willing to pay the same fee for in-depth research based on communities of cultural experts. It was in 2000 when Procter and Gamble (P&G) picked up on the idea and asked Sense Worldwide to develop their seminal open management module, *Working With*

*Culture*. The following year IDEO, the large US design firm, approached Sense Worldwide for its ability in drawing inspiration from many sources starting a mutually beneficial collaboration. For example, working with Eli Lilly on a drug called *Cialis*, a competitor of *Viagra,* Sense Worldwide helped IDEO to understand men's lifestyles by conducting an in-depth exploration of attitudes, behaviours, influences and motivation of a large number of men aged 40 to 50. These early successes with P&G and IDEO rapidly helped Sense Worldwide access other customers like Interbrew, IBM, Unilever, HP and the BBC.

## The Sense Network

The Sense Network began to develop through the personal networks of the people involved at the time. At semi-organised gatherings in someone's living room or pub first friends then also peers discussed a range of business issues in this "neutral space between work and leisure" explains Panjwani. Another entrepreneurial initiative called Museum, established by Brown and Panjwani in 1997, also fed this early Sense Network. Museum was managed as a hybrid between a design consultancy and a recruitment agency for designers and illustrators on a per-project basis. "Museum was a sort of precursor of The Sense Network" – Panjwani remembers – "We were in touch with a lot of different creatives and designers, and many of the people involved in Museum became involved in The Sense Network later on… after a while we stopped doing Museum because Sense Worldwide took up all of our time".

The Sense Network started in 2000 with a series of regular monthly dinners with people met through Museum at The Running Horse, a renowned gastro pub in Mayfair. "Sun Microsystems had a tagline: 'the network is the computer'" – Brown recalls of the period when he was working as a consultant – "But I realized that it was not, it is the people who sit at the computers who are the brains. 'Virtual networks' is all well and good… and very hyped. You have to bring people physically together to make it work". The participants were selected on the basis of their innovative attitude and experimental nature. It was not unusual to see an architect, a journalist, a student and an engineer sitting together and enjoying an open and quirky atmosphere[5]. Nicknamed Sense Suppers[6], these social events fostered the diffusion by word of mouth of The Sense Network supporting its evolution into "an outsourced, not-on-the-payroll, essentially freelance network of experts on hundreds of different topics that [Sense Worldwide] can bring in to solve business problems"[7]. For example, one of the first projects that leveraged The Sense Network was aimed to help the National Theatre improve its audience experience. In 2002, following a review of existing audience research, Sense Worldwide invited all the members of The Sense Network to attend a performance to get a good grasp of consumer attitudes to culture and the National Theatre itself. Complemented by observational research during the day, the research produced a final

[5] ES Magazine, 2002.
[6] ES Magazine, 2002.
[7] Ibidem.

document covering operational and strategic issues to the brand that was debriefed at board level to inspire the future development of the National Theatre.

Over time, the numbers of the members of The Sense Network, named 'Sensers', grew substantially. Among these, a specially recruited group of 'Field Sensers' started to be more involved as sort of local community managers to facilitate Sense Worldwide in carrying out recruitment and translation, organizing the logistics of projects around the globe and reporting on culture. In the same period, to keep participants engaged, Sense Worldwide organized an art exhibition in Amsterdam called A4Art[8] where the artists were given a brief and required to submit an artwork rigorously in A4 format (see **Exhibit 16**). It was an organic yet slow way of building a stronger community and was subsequently held in Buenos Aires, London and Chongqing, China.

## Co-creating with the network

> *"The Sense Network emerged in the late 1990's long before developments that would come to be known as Web 2.0".*
>
> *Richard Donkin, FT Columnist, "The future of work", 2010*

In 2004, Sense Worldwide moved to much better premises in Soho and entered a flourishing period of creativity. Building upon the experience in working with early clients such as the BBC, P&G and Unilever, Jeremy Brown and colleagues had been refining their co-creation approach around the principle 'Asking the right questions, to the right people, in the right way'[9].

Supported by a renewed online platform and by a new series of initiatives, The Sense Network also started enjoying a steady pace of growth (see **Exhibit 17**). For instance, other initiatives had been noWax[10] started in 2003, "I Love My Chair"[11] in 2007, and "Sense Summer Art Fair" in 2009 (see **Exhibit 18**). noWax, a series of music events organized in Shoreditch, London, allowed people to come together and share music via their own mp3 players. With the support of promotional material made available online by Sense Worldwide's designers, noWax rapidly went global with over 2,500 newsletter subscribers and self-organized replicas in Manchester, Hong Kong, Vienna, Los Angeles and Tokyo. "I Love My Chair" was instead an initiative conceived to celebrate the chair as a used object[12].

[8] http://www.a4art.net/
[9] Keegan, S. and Brown, J. (2009). Is co-creation over-hyped? http://www.research-live.com
[10] http://www.nowax.co.uk
[11] http://www.senseworldwide.com/ilovemy/previous.php?winner=yes&ref=3
[12] http://www.businessweek.com/innovate/next/archives/2007/05/i_heart_my_chair.html

Members of The Sense Network ('Sensers') were invited to submit an image of their favourite chair along with some answers to a set of fixed questions. The best submissions were later collected in a self-published book. Finally, the "Sense Summer Art Fair[13]" was a private exhibition event organized in the Sense Loft where Sensers could expose their own work. As Ben, a Senser DJ from Johannesburg, remembers: "Sense Summer Art Fair was the first time I exhibited any of my art internationally and was a really fantastic experience as in all the other Sense adventures I have been a part of"[14].

## Sense Worldwide's Co-creation Approach

*Asking the Right Questions*

'Asking the right questions' involves three core activities: a *Research Amnesty™*, a *Scoping Session*, and an engagement with The Sense Network (see **Exhibit 19**). It also includes *deep-dive* interviewing, a popular technique in the market research sector for conducting in-depth interviews. An example of Sense Worldwide's co-creation approach is the work done for MTV Network. In 2005 MTV Network asked Sense Worldwide to unveil the lifestyle trends of young people in the UK, a segment later became known as the "MTV Generation"[15]. A team of five researchers began by conducting a *Research Amnesty™* on over thirty internal documents, including youth segmentation, market reports and similar analyses. In the following *Scoping Session*, the team explored external sources and a wide range of media. Next, a detailed questionnaire on modern lifestyles was sent to hundreds of Sensers and several half-day *deep-dive* interviews were conducted with all sorts of people. Finally, creative experts were consulted for insights in particular areas of study.

*Asking the Right People*

In Sense Worldwide's view, 'asking the right people' is not only about experts and consumers but must include the alignment of internal business stakeholders to balance a diversity of viewpoints and to speed up the decision making process. In 2006, for example, Sense Worldwide helped Johnson & Johnson (J&J) develop the next generation of *Nicorette* stopping smoking products by running in-depth *Co-Creation Workshops*. During these workshops every single aspect of the business across seven markets was reviewed in intensive collaborative sessions where managers from client organizations, consumers and experts from The Sense Network worked side by side in the development of new ideas. The client's lawyer also attended the workshops and supported the effort by rapidly assessing new ideas. "The lawyer was brilliant!" – Brown remembers – "We were coming up with ideas and he was saying 'actually, there is a piece of work that was done three years ago that we can

[13] http://sensesummerartfair.tumblr.com
[14] Sense Worldwide interview material.
[15] MTV Network Europe, (2005). The MTV Generation: A synthesis, lifestyle report and cultural analysis of young people in the UK.

use as a precedent so to fast track this'. It was a remarkable example of what co-creating with your internal customer means!"

'The right people' also means looking for extreme creative types, i.e. people traditional research agencies generally filter out including professional marketers. For example, talking about Sense Worldwide's involvement in the transformation of Regence Blue Cross Blue Shield, a leading US health care provider, Brian Miller, Sense Worldwide Director of Strategy, recounts: "In the US there is a lot of variance in what people think. We did *deep dive* interviews in a variety of cities including Seattle, Chicago and Salt Lake City. We tried to pick people who were quite extreme in their needs such as somebody who was a prescription drug addict and somebody who was scamming the system. There were also people who did medical tourism in Singapore because it is far cheaper." Senior Regence managers attended the interviews under-cover and realized in real time the impact of their business on people's life. "They became evangelists for the new ideas we developed and convinced others to repeat the same experience", Miller says.

*Asking in the Right Way: FYI and CNCT*

Once the right people are selected and the right questions have been defined, they then need to be 'asked in the right way'. For this Sense Worldwide use a set of community tools they have created leveraging The Sense Network (see **Exhibit 20**). For example, in 2006 Sense Worldwide developed FYI (For Your Inspiration), a dynamic intelligence platform for sharing fresh insights and business-critical information within and across organizations. At a simple level FYI is a database that allows people on the client side to link new documents and insights to the existent knowledge base. More importantly, it also enables Sense Worldwide's researchers and Sensers to tag pieces of information so as to generate a constantly evolving source of inspiration and new perspectives.

Building upon the experience with The Sense Network, Sense Worldwide also developed CNCT, i.e. Community Network Conversation Tools. CNCT is a collaborative platform through which Sense Worldwide fosters co-creation between clients and Sensers. By giving the participants the possibility to blog and share video or audio files, CNCT helps Sense Worldwide engage them in communal activities such as providing targeted feedback on products or services as well as brainstorming and discussing new ideas. The goal is to support organizations in monitoring shifting consumer attitudes and in quickly responding with rapid prototyping and concept-testing without the lead time of conventional techniques.

For instance, the CNCT platform was used by Nike to renew its sportswear products during 'Project Icon'. "We've been through a lot of other methodologies, we've done the focus groups" – Jason Fulton, Nike EMEA Consumer Cultures Manager, points out – "But once you actually start to spend time working with the consumer over a period of time [...] then you really start to get a crackling of energy and somewhere new that the brand can go". Through The Sense Network, many cultural experts including magazine editors, bloggers and photographers were recruited in ten countries and were involved in *Co-Creation Workshops* to disentangle the iconic essence and principles of Nike products. Liz, a Senser from Berlin,

remembers: "Sense Worldwide had sourced people from all over the world to take part which made for a really varied, interesting and weird (in a good way) mix! I still remember some of the outlandish and crazy ideas that some groups came up with and even if some of the ideas were far-fetched, I loved how creative the people there were! It was inspiring!"[16] During 'Project Icon' Sense Worldwide developed more than 100 product concepts that Nike then converted into new product directions and market activation[17]. Following this success, in 2010 Nike and Sense Worldwide started a new ongoing project on CNCT, 'The SQUAD', where teams of promising teen footballers from 15 global cities are involved in continuous monitoring of football-related trends.

*Co-creation for The Discovery Species Project*[18]

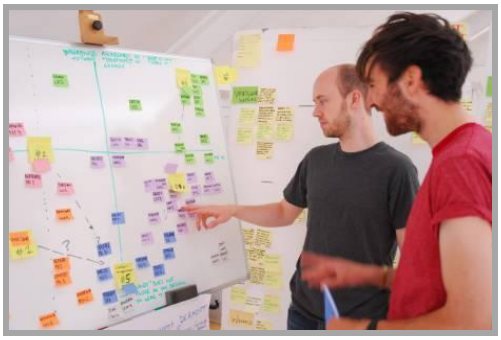
In 2007-2008 Sense Worldwide conducted for Discovery Channel the Species Project, a comprehensive exploration of the changing lifestyles of men aged 25-39. The research, conducted across 15 countries, started with a *Research Amnesty*$^{TM}$ which involved the analysis of previous Discovery projects and sourced material. Sense Worldwide then did nearly 100 interviews with experts such as economists, marketers, journalists and professors of gender studies, psychology and sociology and with 45 target consumers. Further research was conducted online with another 12,000 men to build a segmentation model that was then validated by conducting other 54 interviews.

Next, Discovery Channel required Sense Worldwide to use its FYI platform as a solution to keep the Species Project updated and running over time. With the financial support of NESTA[19], Sense Worldwide and Discovery set up the CKPP (Collaborative Knowledge Partner Programme)[20], an initiative which involved several leading companies with the aim "to deliver invaluable learnings around how consumer brands can cost-effectively work together on insight-driven collaborations"[21]. In the first quarter of 2010, teams of 2-3 representatives from brands including Microsoft, P&G, Diageo and Samsung attended a series of *Co-Creation Workshops* at Discovery's London headquarter and collaborated to identify potential synergies and opportunities. Between each workshop, the teams interacted using the *FYI* platform led by Sense Worldwide researchers. "Creativity and actionable insights underpinned every part of this study from the methodology right through to final output", Clare O Connor, Discovery EMEA Director of Insights and Innovation, recalls. In the following months Sense Worldwide, Discovery and NESTA maintained an ongoing support of the brand teams to keep the collaboration successful.

[16] Sense Worldwide interview material.
[17] "Market Research Agency of the Year: Sense Worldwide". Marketing Magazine, Dec 2009.
[18] www.discoveryspecies.com
[19] UK National Endowment for Science, Technology and the Arts (www.nesta.org.uk).
[20] Bolger, B. and O'Conner, C. (2010). Socialising Insight to Drive Corporate Collaboration: What happens when brands start co-creating among themselves as well as with consumers. Proceedings of the Annual Market Research Society Conference.
[21] "Initiative brings brands together online to collaborate on product innovations", Marketing Magazine, 22 October 2009.

## Exhibit 1

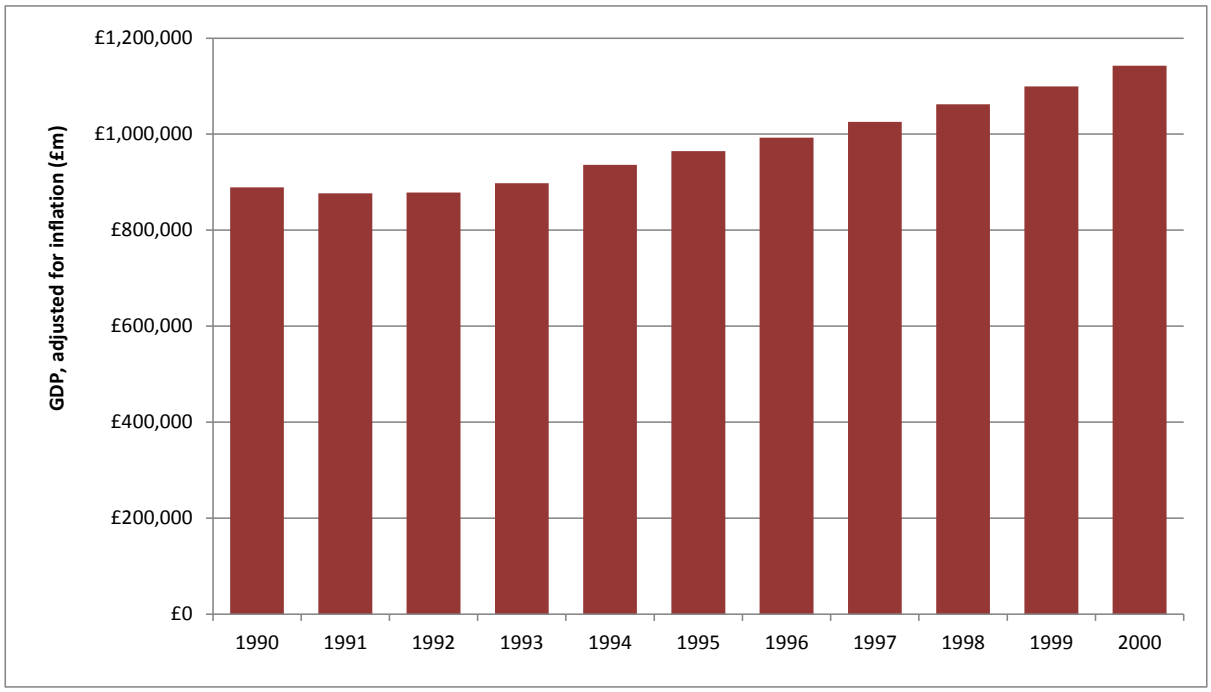
## Visuals of a Typical Co-Creation Workshop in the Sense Loft



*Source: Sense Worldwide*

## Exhibit 2

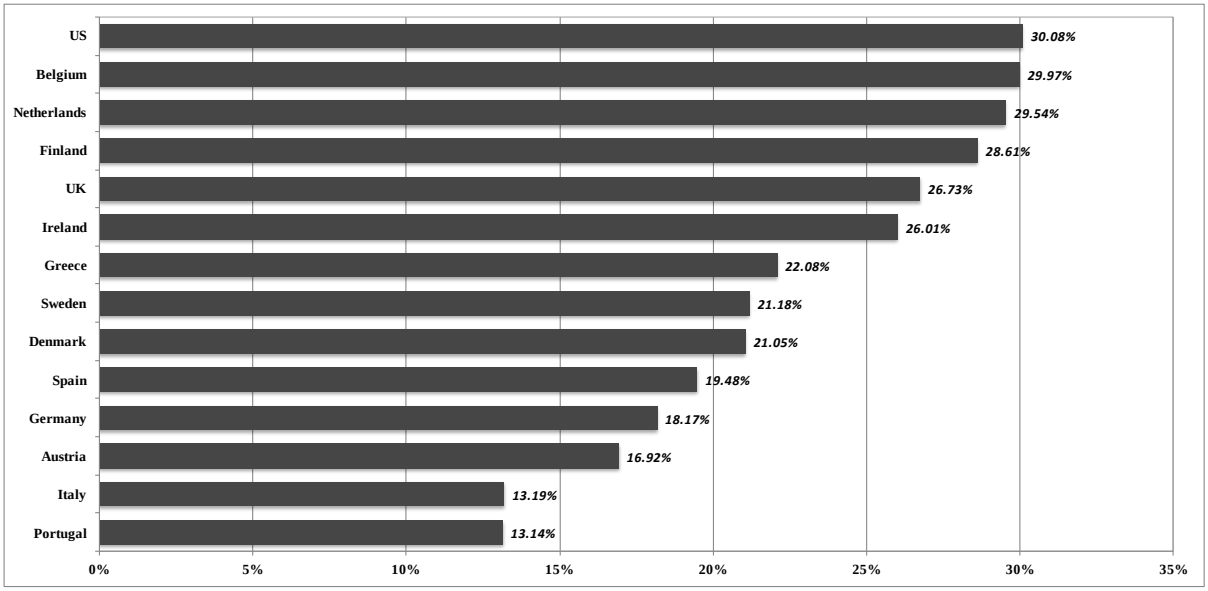
## UK GDP Growth 1990-2000




*Source: UK Office for National Statistics*

## Exhibit 3

## Creative Workers as Percent of Total Employment




*Source: R. Florida and I. Tinagli, Europe in the Creative Age, 2004.*

## Exhibit 4

## The UK Market Research and Advertising Market 1994-1998

| | | 1994 | 1995 | 1996 | 1997 | 1998 |
|---|---|---|---|---|---|---|
| **Market Research** | **£m** | 485 | 597 | 669 | 745 | 810 |
| | ***% change year-on-year*** | - | 23.1% | 12.1% | 11.4% | 8.7% |
| **Spending on all Advertising** | **£bn** | 10.14 | 10.99 | 12.04 | 13.29 | 14.31 |
| | ***% change year-on-year*** | - | 8.4% | 9.6% | 10.4% | 7.7% |

*Source: adapted from Key Note / Market Assessment International*

## Exhibit 5

## Expected Growth of Advertising Expenditure 1999-2004 (UK)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---|---|---|---|---|---|---|
| Total % growth | 12% | 12% | 13% | 14% | 14% | 15% |
| **Advertising % by type** | | | | | | |
| Television | 28% | 28% | 29% | 29% | 29% | 29% |
| Direct mail | 12% | 13% | 13% | 14% | 14% | 15% |
| Press, classified | 24% | 23% | 23% | 22% | 22% | 21% |
| Press, display | 28% | 28% | 26% | 26% | 26% | 25% |
| Other | 8% | 8% | 9% | 9% | 9% | 10% |
| **Total** | **100%** | **100%** | **100%** | **100%** | **100%** | **100%** |

*Source: Market Assessment International*

## Exhibit 6

## Market Research and Advertising Agencies in the UK by Turnover (1999)

| | Market Research Agencies | | Advertising Agencies | |
|---|---|---|---|---|
| **(£000)** | **Number of businesses** | **%** | **Number of businesses** | **%** |
| **1-49** | 305 | 20.2% | 2,485 | 22.2% |
| **50-99** | 315 | 20.9% | 2,050 | 18.3% |
| **100-249** | 330 | 21.9% | 2,250 | 20.1% |
| **250-499** | 195 | 12.9% | 1,205 | 10.7% |
| **500-999** | 150 | 9.9% | 920 | 8.2% |
| **£1m-£5m** | 170 | 11.3% | 1,965 | 17.5% |
| **Over £5m** | 45 | 3.0% | 340 | 3.0% |
| **Total** | **1,510** | | **11,215** | |

*Source: adapted from Key Note / Market Assessment International / Business Monitor PA1003 / CSO*

## Exhibit 7

## Rationale for Agency Selection (1999)

| Factors ranked top or second out of 10 | |
|---|---|
| **1** Creativity | 60.0% |
| **2** Value for money | 59.3% |
| **3** Undestand client & their business | 48.0% |
| **4** Quality of account management | 43.3% |
| **5** Media planning/buying | 35.4% |
| **6** Marketing strategy | 33.3% |
| **7** Attentive and adaptable | 26.7% |
| **8** Financial stability | 21.3% |
| **9** Offices outside the UK | 4.7% |

*Source: adapted from Market Assessment International / Marketing Week*

## Exhibit 8

## Main Interview Methods used by UK Market Research Agencies by Revenues (1998)

| Interview Method | Revenues (£m) | % |
|---|---|---|
| Retail audit | 69.6 | 8.6% |
| Consumer panel | 47.8 | 5.9% |
| Discussion group | 108.5 | 13.4% |
| Depth interviews | 49.3 | 6.1% |
| Hall/Central location tests | 83.5 | 10.3% |
| Street interviews | 9.7 | 1.2% |
| Other face-to-face interviews | 152.8 | 18.9% |
| Telephone interviews | 167.9 | 20.7% |
| Mystery shopping | 24.2 | 3.0% |
| Other observation | 1.9 | 0.2% |
| Postal/self completion | 67.1 | 8.3% |
| Other method | 27.9 | 3.4% |
| **Total** | **810.2** | **100.0%** |

*Source: Key Note*

**Exhibit 9**

**Main Areas of Expertise of UK Market Research Agencies (1999)**

| Area of Expertise | Number of agencies with expertise in this area | % |
|---|---|---|
| Qualitative research | 619.0 | 74.8% |
| Focus groups | 587.0 | 70.9% |
| Quantitative research | 513.0 | 62.0% |
| In-home interviews | 307.0 | 37.1% |
| Hall tests | 260.0 | 31.4% |
| Desk research | 252.0 | 30.4% |
| Paper-based personal interviewing | 243.0 | 29.3% |
| Paper-based telephone interviewing | 231.0 | 27.9% |
| Postal research | 227.0 | 27.4% |
| Questionnaire design | 221.0 | 26.7% |
| Tabulation and analysis | 203.0 | 24.5% |
| Computer-aided telephone interviewing | 161.0 | 19.4% |
| Street interviews | 160.0 | 19.3% |
| Observation | 136.0 | 16.4% |
| Coding and data entry | 118.0 | 14.3% |
| Mystery shopping | 117.0 | 14.1% |
| Modelling/simulation | 109.0 | 13.2% |
| Continuous/panels | 108.0 | 13.0% |
| Internet surveys | 84.0 | 10.1% |
| Computer-aided personal interviewing | 79.0 | 9.5% |
| Omnibus surveys | 51.0 | 6.3% |

*Source: Key Note based on The Research Buyer's Guide, 1998/1999*

## Exhibit 10

### 'Top Agencies' by Reputation (1999)

| | Advertising Agencies | | Creative Agencies |
|---|---|---|---|
| 1 | JWT | 1 | BBH |
| 2 | BMP/DDM | 2 | BMP |
| 3 | McCann Erickson | 3 | AMV |
| 4 | AMV/BBDO | 4 | HHCL |
| 5 | Ogilvy & Mather | 5 | TBWA |
| 6 | Saatchi & Saatchi | 6 | M&C Saatchi |
| 7 | Bartle Bogle Hegarty | 7 | McCann Erickson |
| 8 | M&C Saatchi | 8 | St Lukes |
| 9 | WWAV Rapp Collins | 9 | JWT |
| 10 | Rainey Kelly | 10 | Saatchi & Saatchi |
| 11 | Young & Rubicam | 11 | WCRS |

*Source: Market Assessment International / Marketing Week*

## Exhibit 11

### Top Ten Global Agencies by Gross Income

| | Group | $m | Nat | Main UK Office |
|---|---|---|---|---|
| 1 | **Omnicom** | 4,812 | US | AMV/BBDO, TBWA, DDB |
| 2 | **Interpublic** | 4,304 | US | McCann Erickson, APLintas |
| 3 | **WPP** | 4,156 | UK | JWT, Ogilvy & Mather |
| 4 | **Dentsu** | 1,786 | Jap | CDP |
| 5 | **Young & Rubicam** | 1,660 | US | Rainey Kelly, Y&R |
| 6 | **Havas** | 1,298 | Fra | Euro RSG |
| 7 | **True North** | 1,242 | US | FCB, Bozell, |
| 8 | **Grey** | 1,240 | US | Grey |
| 9 | **Leo Burnett** | 950 | US | Leo Burnett |
| 10 | **Publicis** | 930 | Fra | Publicis |

*Source: AA / Market Assessment International*

## Exhibit 12

## Major Groups (1998)

| Group Structure | Main UK Office |
|---|---|
| **WPP** | |
| Advertising agencies | Ogilvy & Mather, JWT |
| Media | Mindshare |
| Direct marketing | RTC Direct, Ogilvy One |
| PR | Hill & Knowlton, Ogilvy Public Relation |
| Sponsorship | PRISM |
| Market Research | Kantar Group; Millward Brown, etc. |
| Other | The Henley Centre, CommonHealth, Enterprise IG, etc. |
| UK Turnover | 1998: £902m out of total £8.0bn |
| **Omnicom** | |
| Advertising agencies | BBDO, AMV, DDB, TBWA, Maher Bird, Simons Palmer, Griffin Bacal |
| Direct marketing | WWAV Rapp Collins |
| PR | Fleishman Hillard |
| Other | Interbrand |
| UK Turnover | 1998: £464m out of total £4.09bn |
| **MacManus** | |
| Advertising agencies | DMB&B |
| Media | Televest |
| PR | Manning Selvage & Lee |
| Other | Medicus Group, Blue Marble |
| UK Turnover | - |
| **Interpublic** | |
| Advertising agencies | McCann Erickson, Ammirati Puris Lintas, Lowe, Kelly, Weedon Shute |
| Media | Universal McCann, Western International, Initiative |
| Direct marketing | Draft Worldwide |
| UK Turnover | 1998: £388m out of total £3.08bn |
| **Young & Rubicam** | |
| Advertising agencies | Young & Rubicam, Rainey Kelly |
| Media | Media Edge |
| Direct marketing | Wunderman Cato Johnson |
| PR | Burson Marsteller |
| Other | Landon Associates |
| UK Turnover | - |
| **Havas/Eurocom RSCG** | |
| Advertising agencies | Euro RSCG |
| Media | Communication Interactive |
| PR | Biss Lancaster |
| Other | ER Healthcare |
| UK Turnover | 1997: £409m out of total £2.71bn |

*Source: Market Assessment International*

**Exhibit 13**

**Key Buyers of Market Research by Sector (1997)**

| Sector | Revenue (£000) | % Change 1996-1997 |
|---|---|---|
| Food and soft drinks | 65,111 | 4.2% |
| Media | 39,873 | 1.3% |
| Financial services | 39,717 | 18.4% |
| Public services and utilities | 36,962 | 5.3% |
| Health and beauty | 34,883 | 18.3% |
| Pharmaceuticals | 32,982 | 10.3% |
| Vehicle manufacturers | 32,883 | 19.9% |
| Business and industrial | 29,490 | 14.8% |
| Retailers | 29,669 | 14.3% |
| Government and public bodies | 21,130 | 2.2% |
| Alcoholic drinks | 19,143 | 17.5% |
| Household products | 17,663 | 7.5% |
| Travel and transport | 16,015 | 9.2% |
| Advertising agencies | 8,211 | -18.4% |
| Sub-contracted from other marketing agencies | 6,861 | 6.3% |
| Oil | 6,405 | 7.0% |
| Household durables | 4,814 | -5.0% |
| Tobacco | 3,303 | 20.6% |
| Other consumer | 16,215 | 43.7% |
| Other direct clients | 41,070 | 20.9% |
| **Total** | 502,400 | |

*Source: Key Note / AMSO data*

## Exhibit 14

## Top 10 Advertisers (1998)

| | Company | Sector | £m |
|---|---|---|---|
| 1 | **BT** | Telecoms | 105.4 |
| 2 | **P&G** | Detergents, personal care | 100.1 |
| 3 | **Vauxhall Motors** | Cars | 83.7 |
| 4 | **Ford Motor Company** | Cars | 81.5 |
| 5 | **Renault UK** | Cars | 80.5 |
| 6 | **Kellogg Company** | Cereals | 67.1 |
| 7 | **Elida Fabergé (Unilever)** | Personal care | 63.1 |
| 8 | **Central Office of Information** | Government | 59.3 |
| 9 | **L'Oréal** | Personal care | 58.2 |
| 10 | **Mars Confectionery** | Confectionery | 54.1 |
| | **Total** | | **753.0** |

| | Brand | Sector | £m |
|---|---|---|---|
| 1 | **McDonald's** | Fast food | 42.6 |
| 2 | **Mercury One2One** | Telecoms | 29.5 |
| 3 | **Sainsbury's** | Food retail | 23.3 |
| 4 | **DFS** | Furniture retail | 22.0 |
| 5 | **Rover** | Car | 20.9 |
| 6 | **Coca Cola** | Soft drink | 20.2 |
| 7 | **Sky Digital** | Broadcast | 19.2 |
| 8 | **Renault Clio** | Car | 18.0 |
| 9 | **Currys** | Electrical retail | 17.7 |
| 10 | **Tesco** | Food retail | 17.4 |
| | **Total** | | **230.8** |

*Source: adapted from Market Assessment International / AA / IPA*

## Exhibit 15

## Leading Newspaper Groups

| | |
|---|---|
| **News Corporation** | The Sun, The Times, The Sunday Times |
| **Daily Mail & General Trust** | Associated Newspapers, Daily Mail, Mail on Sunday |
| **United News & Media** | Express Newspapers |
| **Telegraph Trust (private)** | Daily Telegraph, Sunday Telegraph |
| **Independent News & Media** | The Independent, Independent on Sunday |
| **Portsmouth & Southern** | Leading group of regional newspaper holdings |

*Source: Market Assessment International*

**Exhibit 16**

**Visual of A4Art Exhibitions**

*Amsterdam, The Netherlands*

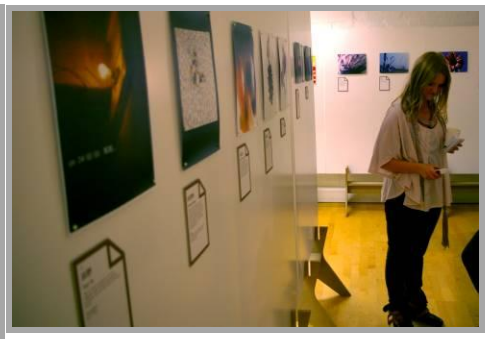
*(2002)*

*Buenos Aires, Argentina*

*(2003)*

*London, UK*

*(2004 and 2009)*



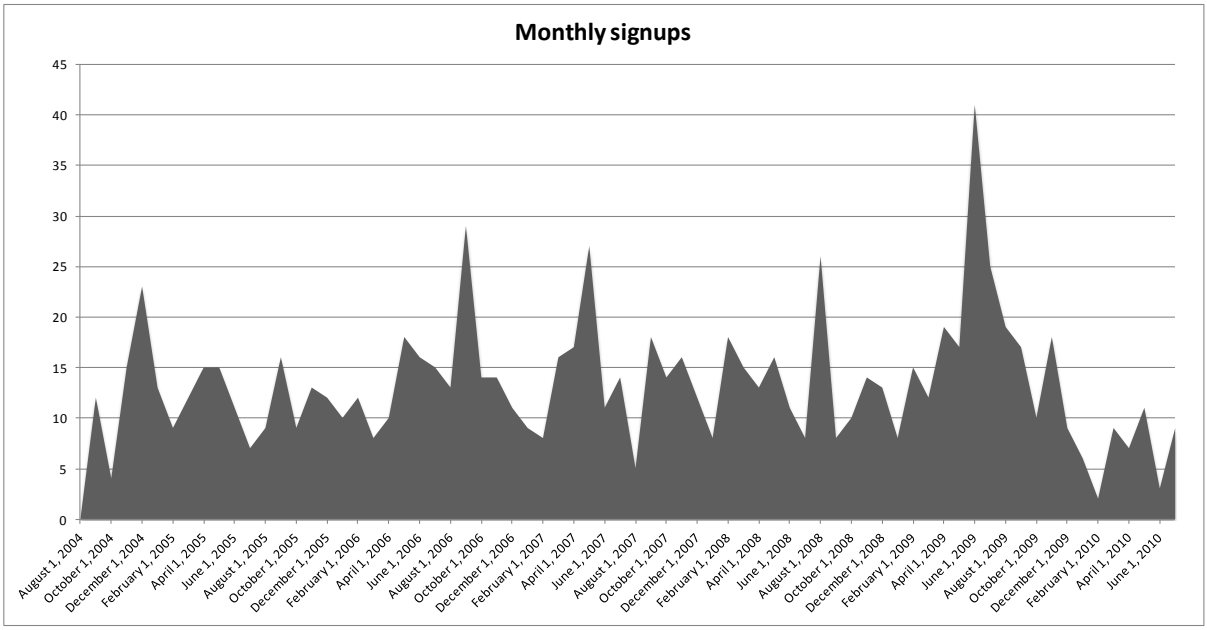
*Chongqing, China*

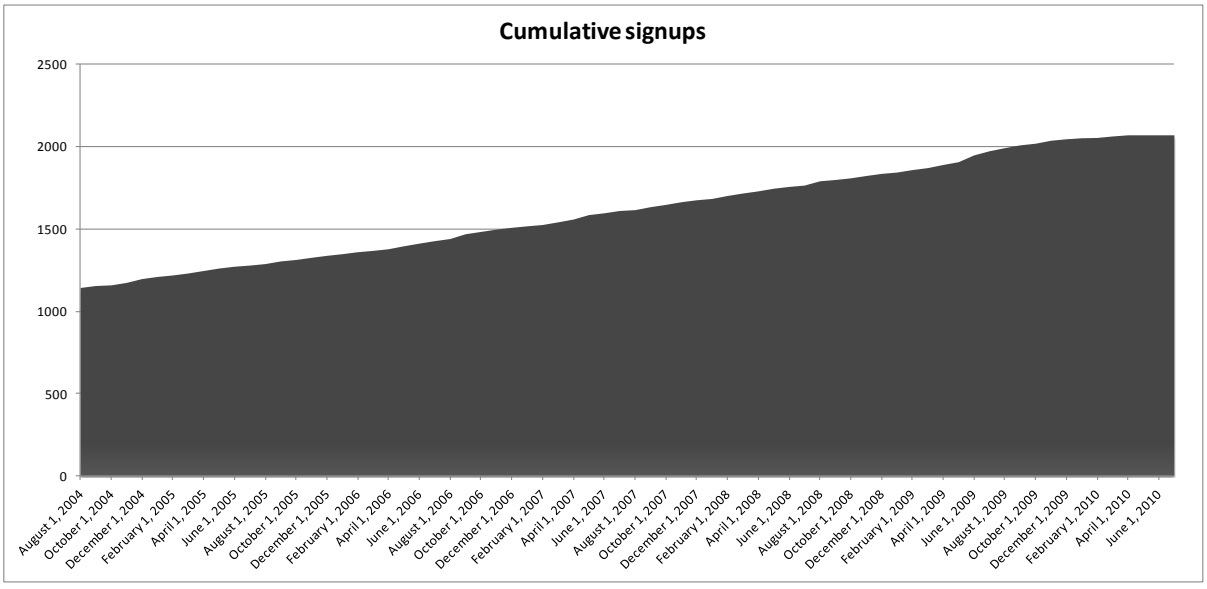
*(2008)*

*Source: Sense Worldwide*

## Exhibit 17

## The growth of The Sense Network

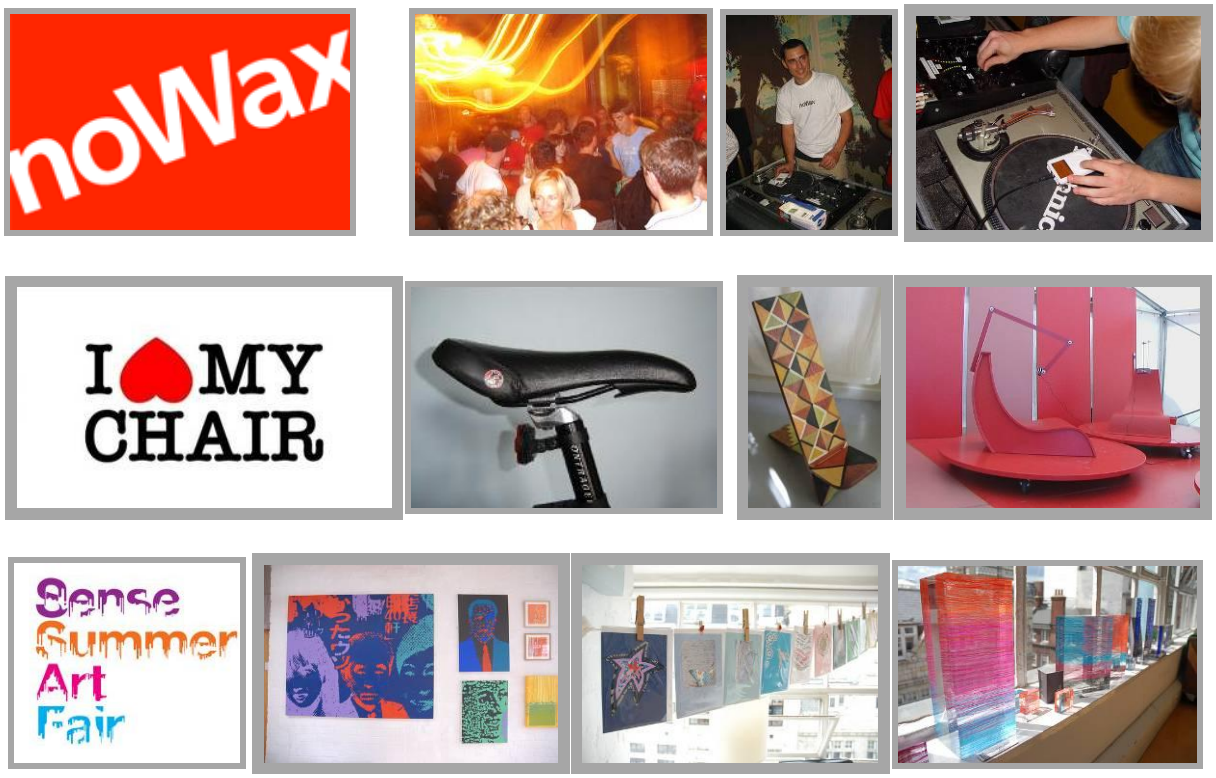



*Source: Sense Worldwide*

**Exhibit 18**

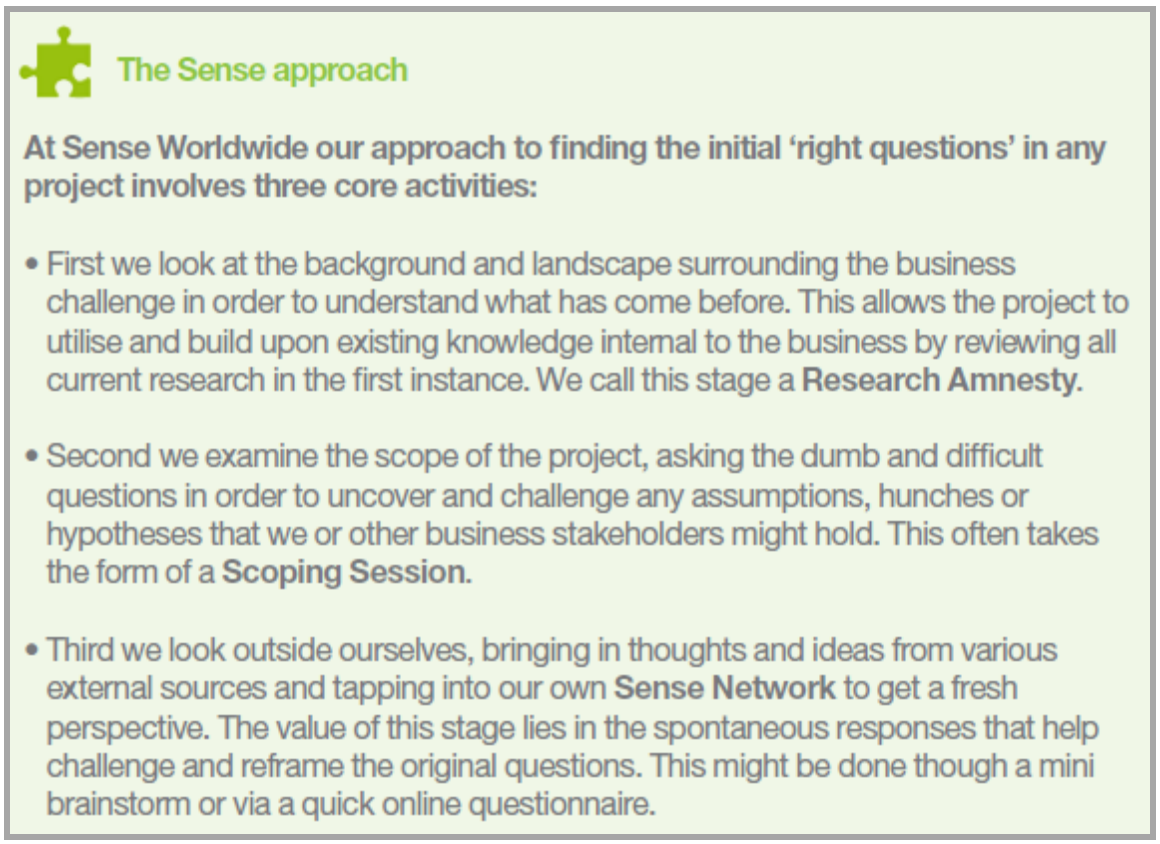
**Visuals of selected Sense Worldwide network initiatives**




*Source: www.senseworldwide.com*

**Exhibit 19**

**Sense Worldwide Tool Kit**



## The Sense approach

**At Sense Worldwide our approach to finding the initial 'right questions' in any project involves three core activities:**

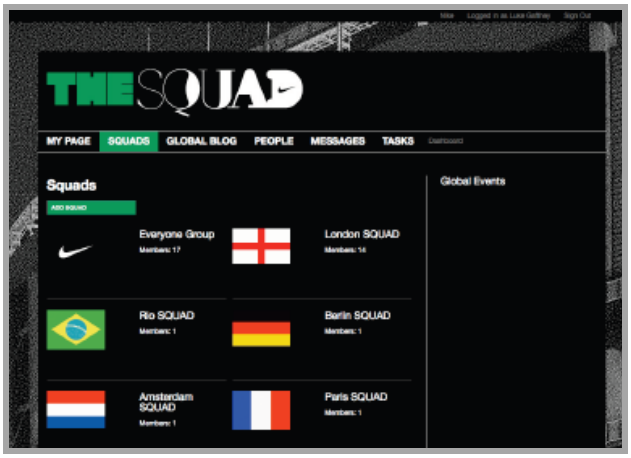
- First we look at the background and landscape surrounding the business challenge in order to understand what has come before. This allows the project to utilise and build upon existing knowledge internal to the business by reviewing all current research in the first instance. We call this stage a **Research Amnesty**.
- Second we examine the scope of the project, asking the dumb and difficult questions in order to uncover and challenge any assumptions, hunches or hypotheses that we or other business stakeholders might hold. This often takes the form of a **Scoping Session**.
- Third we look outside ourselves, bringing in thoughts and ideas from various external sources and tapping into our own **Sense Network** to get a fresh perspective. The value of this stage lies in the spontaneous responses that help challenge and reframe the original questions. This might be done though a mini brainstorm or via a quick online questionnaire.

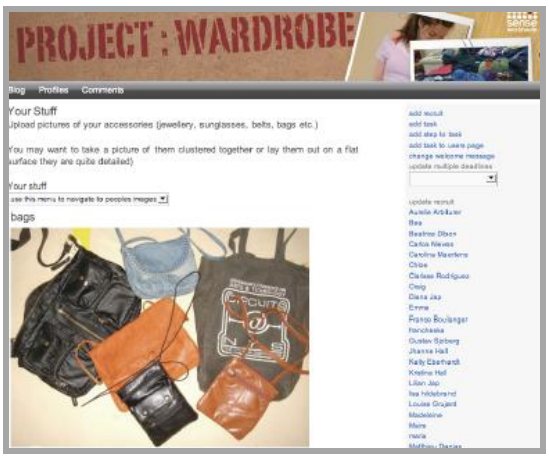
*Source: Sense Worldwide (2009). The Spirit of Co-creation. White Paper.*

## Exhibit 20

## Visuals of Sense Worldwide online communication tools

### *CCNT*




### *FYI*

*Source: Sense Worldwide; www.marketingmagazine.co.uk*